

2020 SAMHSA SOAR February e-News

Enhance Your SAMHSA SOAR Toolbox

Refreshing your SAMHSA SOAR Toolbox with new and enhanced resources from the SAMHSA SOAR TA Center is a great way to ensure that your SOAR-assisted disability benefit applications and SOAR initiative are robust. Download these tools today and get ready to SOAR!

Resources to Strengthen Your SAMHSA SOAR-assisted SSI/SSDI Applications

Successful SAMHSA SOAR-assisted SSI/SSDI benefit applications are ones that employ all five of the SOAR model's **critical components**. These SAMHSA SOAR TA Center resources will help you use the critical components and develop robust, high-quality SSI/SSDI applications:



Sample SOAR Referral Application
Please complete in full and file in (Social Security) file #

Referring agency: _____ Date of referral: _____
Staff contact number: _____ Email address: _____

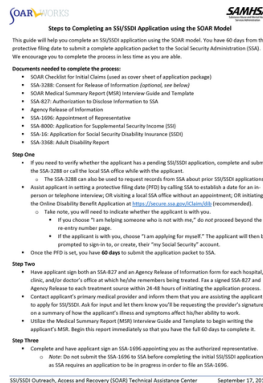
Candidate identification information:
Date of birth: _____ Gender: _____ (Please print name) _____
SSN: _____ Education (last grade completed): _____ Marital status: _____
Current living arrangement (address, shelter, area of town): _____
Employment status: _____ Volunteer? _____

Part A: Homelessness/Risk Assessment
Where is the candidate currently living? Check the appropriate box.

Where is the candidate currently living?	Yes	No
Homeless		
Shelter		
Transitional housing		

Part B: Current Application for SSA Benefits or Pending Appeal
Has the candidate recently applied for Social Security benefits?

Yes	No



Steps to Completing an SSI/SSDI Application using the SOAR Model

This guide will help you complete an SSI/SSDI application using the SOAR model. You have 60 days from the protective filing date to submit a complete application packet to the Social Security Administration (SSA). We encourage you to complete the process in less time as you are able.

Documents needed to complete the process:

- SSA-1000: Checklist for Initial Claims (used as cover sheet of application package)
- SSA-1000: Consent for Release of Information (signed, not notarized)
- SSA-1000: Medical Summary Report (MSR) Interview Guide and Template
- SSA-1000: Authorization for Disclosure of Information to SSA
- Agency Release of Information
- SSA-1000: Appointment of Representative
- SSA-1000: Application for Supplemental Security Income (SSI)
- SSA-1000: Application for Social Security Disability Insurance (SSDI)
- SSA-1000: Adult Disability Report

Step One:

- If you need to verify whether the applicant has a pending SSI/SSDI application, complete and submit the SSA-1000-01 or call the local SSA office where the applicant.
- The SSA-1000-01 can also be used to request records from SSA about prior SSI/SSDI applications.
- Assist applicant in writing a protective filing date (PFD) by calling SSA to establish a date for an in-person or telephone interview. (If calling a local SSA office without an appointment, call using the Online Disability Benefit Application at <https://ssa.gov/online>.) (Recommended.)
- If you choose "I am helping someone who is not with me," do not proceed beyond the online mailbox page.
- If the applicant is with you, choose "I am applying for myself." The applicant will then be prompted to sign in as an adult, then "my Social Security" account.
- Once the PFD is set, you have **60 days** to submit the application packet to SSA.

Step Two:

- Have applicant sign both an SSA-827 and an Agency Release of Information form for each hospital, clinic, and/or doctor office at which the interview is being conducted. Use a signed SSA-827 and Agency Release to each treatment source within 24-48 hours of obtaining the application process.
- Complete applicant's online medical provider and other forms that you are assisting the applicant to apply for SSI/SSDI. Ask for input and let them know you're requesting the provider's signature as a summary of how the applicant's illness and symptoms affect their ability to work.
- Submit the Medical Summary Report (MSR) Interview Guide and Template to begin writing the applicant's MSR. Begin this report immediately so that you have the full 60 days to complete it.

Step Three:

- Complete and have applicant sign an SSA-1000-01 appointing you as the authorized representative.
- After you submit the SSA-1000-01 to SSA before completing the initial SSI/SSDI application, an SSA requires an application to be in progress in order to file an SSA-1000.



Medical Summary Report Interview Guide and Template
For applications filed on or after January 17, 2017

The **Medical Summary Report (MSR) Interview Guide** provides sample questions and guidance for gathering relevant information to the SSI/SSDI disability determination process. We do not expect you to ask all of the questions in each section. The questions are intended to help you gather all of the information you will need to write a Medical Summary Report. For example, if the individual has not been in military service, there is no need to include a military history section. Likewise, if the individual has no high school, do not include a high school section.

Using this guidance, SOAR-trained providers are able to gather a thorough history in a respectful manner, which in turn helps the Disability Determination Service (DDS) understand the nature of a person's impairment and the effect of that impairment on work ability and functioning. The **MSR Interview Guide** may be used to complete information in the form of a narrative letter to DDS/DDS as part of the SOAR process. The template has eight main sections, covering the types of information that DDS needs to make a decision. Use the headings provided in the template to organize your MSR.

Use this information to complete the MSR:
How questions are asked can be critical to obtaining the appropriate information. It is important to be sensitive to influences that affect a person's ability and willingness to provide information (cultural factors, past experiences with the mental health system, etc.). The interviewing process can also uncover sensitive topics that need to be approached with care. When asking about trauma, it is critical to not overwhelm the applicant. It is equally important that the person be safe and secure after leaving the interview. Gathering such personal information requires a sensitive and skilled interviewer.

SOAR Tip: Interviewers who feel uncomfortable or ill-equipped to explore certain topics should do so instead, they should seek assistance from someone who is more clinically skilled and more able to assess responses, to ensure that the person is safe from self-harm and/or emotional distress after the interview ends.

Sample SOAR Referral Tool

Steps to Completing an
SSI/SSDI Application Using the
SOAR Model

Medical Summary Report (MSR)
Interview Guide and Template

Sample SOAR Referral Tool

Updated in January 2020, the referral tool is a brief assessment of an individual's living situation, previous applications for Social Security disability benefits, physical and mental health diagnoses, and information about past or current employment. Programs can use this tool to identify potential applicants for SOAR assistance.

Steps to Completing an SSI/SSDI Application Using the SOAR Model

This guide outlines the six steps to completing a high-quality SOAR-assisted SSI/SSDI application and provides a list of documents needed to complete the process.

Medical Summary Report Interview Guide and Template

Use this tool helps you gather all the information you will need to write a Medical Summary Report and compile the information in the form of a narrative letter to the Social Security Administration (SSA) and Disability Determination Services (DDS).

Resources to Enhance Your SOAR Initiative

Comprehensive SSI/SSDI applications are just one piece of the SOAR puzzle. Strong collaborative partnerships between community providers, state agencies, and local SSA and DDS offices are essential to ensuring that all eligible individuals can have their SOAR-assisted SSI/SSDI applications processed efficiently. These SAMHSA SOAR TA Center resources can help enhance your SOAR initiative:



SOAR Overview

Getting Involved with
SOAR

SSA and DDS Collaborations

SOAR Overview

The SOAR Overview describes the importance of income supports for individuals experiencing or at risk of homelessness who have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder. This one-page document is helpful in providing an overview of the SOAR model's impact and national outcomes for new stakeholders.

Getting Involved with SOAR

Assisting individuals with complete and quality applications requires commitment, but it is well worth the effort! This document outlines the training process of the SOAR Online Course, the time commitment for application assistance, follow up and outcome tracking, involvement with local steering committees, and the benefits of participating in the SOAR initiative.

SSA and DDS Collaborations

A key component of the SOAR model is developing strong collaborations with SSA and DDS. The SAMHSA SOAR TA Center has created a guide to help! This document provides examples of how successful relationships benefit SOAR-trained case managers, SSA, and DDS.

Sharing Our Successes

Multi-state Collaboration Leads to Incredible SOAR Success in Kansas

Robyn Nienstedt-Whitaker from Crosswinds Counseling and Wellness in Emporia, Kansas, wrote in to share an inspiring SOAR success story:

Jennifer* was referred to me for our transitional living program after she was released from jail. I had previous experience working with her and knew that she had been denied SSA benefits a couple of times. Jennifer struggled to open up due to her traumatic history and paranoia, making finding accurate history and hospitalizations for her difficult. However, we were able to obtain records that verified her treatment and housing in multiple states. Records were able to verify numerous hospital and jail stays.

During the waiting stage, Jennifer absconded from probation, walked away from the transitional living program, and had a warrant out from her arrest. Several months later, we were contacted by a psychiatric hospital in another state stating that she was inpatient there. Jennifer returned to Kansas to resolve her legal matters while waiting on an SSA

determination. In September, Jennifer was approved for SSA benefits. Due to being able to verify that Jennifer was experiencing homelessness and in a psychiatric hospital at the time of the previous denial, SSA determined her onset date to be in 2015. **She was awarded over \$30,000 in back payment and now has a reliable income for the first time in her life.** Without a SOAR worker, Jennifer would have been unable to complete the SSA process again. This is why SOAR works!

Thank you so much for sharing this SOAR success, Robyn! What an incredible story of collaboration and persistence!

[Submit Your SOAR Success](#)

*Sharing Our Successes stories are edited for brevity and clarity. All client names have been changed to protect anonymity.

Events

[SOARing Over Lunch Conference Calls](#)

February 11, 2020, 1:00 p.m. ET

The next SOARing Over Lunch Conference Call will take place on February 11, 2020, at 1:00 p.m. ET! The SAMHSA SOAR TA Center hosts this series of informal monthly calls designed to help support SOAR efforts across the country. Participants can join to ask about any SOAR-related question they may have.

[Add SOARing Over Lunch to Your Calendar](#)

[Completing Quality SOAR Applications Webinar: SSA's Sequential Evaluation—Understanding Step 3 and Step 5](#)

On January 22, 2020, the SAMHSA SOAR TA Center hosted the webinar *Completing Quality SOAR Applications: SSA's Sequential Evaluation—Understanding Step 3 (The Listings) and Step 5 (The Grids)*. In this webinar, presenters shared guidance on [SSA's 5-step Sequential Evaluation](#), the Listings, and the Grids. In addition, SOAR practitioners shared tips on how to reference the Listings and Grids in Medical Summary Reports. The materials and recording from this webinar are now available for download.

Partner Opportunity: SAMHSA's GAINS Center Seeks Experienced Trainers to Participate in Trauma-Informed Responses Train-the-Trainer Event

SAMHSA's GAINS Center is offering experienced trainers the opportunity to apply to become the local expert in providing their [How Being Trauma-Informed Improves Criminal Justice System Responses](#) training program. The GAINS Center is currently soliciting applications from experienced individual trainers who are interested in developing their capacity to provide this training to their agency or community. The target audiences for the training program are primarily community-based criminal justice system professionals, including law enforcement, community corrections (probation, parole, and pre-trial services), court personnel, as well as human service providers that serve adult justice-involved populations. Selected applicants will learn to facilitate the training via a centralized Train-the-Trainer event and subsequently deliver the training program in their local communities across the country. While not a requirement to apply for this opportunity, this year's training events will place a special emphasis during the selection process on applicants who provide training to drug courts and/or reentry programs.

SAMHSA's GAINS Center is offering this event to those who successfully complete the application process at no cost to the participant. **While participants must cover their own travel expenses, there are no fees for registration, tuition, materials, or follow-up technical assistance and support associated with the event.** There are three TTT events

scheduled for June 10-11, July 22-23, and August 12-13, 2020, at the Sage Colleges in Albany, NY, so please note the dates before applying. You will be expected to attend one of these full 2-day trainings. If this TTT event for individuals is of interest to you, please review the solicitation and submit your completed application form to the GAINS Center no later than **February 21, 2020**.

Learn More and Apply

Get Social with the SAMHSA SOAR TA Center

Hear more about what SAMHSA SOAR is up to via [@samhsagov](https://twitter.com/samhsagov) on Twitter, [@samhsa](https://www.facebook.com/samhsa) on Facebook, and [Substance Abuse and Mental Health Services Administration](https://www.substanceabuseandmentalhealthservicesadministration.gov) on LinkedIn!



Get Your Graduate Research Funded with the ARDRAW Small Grant Program

Application deadline: February 28, 2020



The Social Security Administration is awarding graduate students \$10,000 stipends to research work, rehabilitation, and disability issues through the [Analyzing Relationships Between Disability, Rehabilitation, and Work \(ARDRAW\) Small Grant Program](#). The objective of ARDRAW is to foster new analyses of these issues that may develop innovative and fresh perspectives on disability by providing research stipends to a broad spectrum of graduate students.

Applicants must be masters, doctoral, or post-doctoral-level part-time or full-time graduate students pursuing studies in accredited programs at the time of the award (Fall Semester of 2020). Selected students will receive a stipend of \$10,000 for the 1-year program.

Apply for the ARDRAW Grant



The Substance Abuse and Mental Health Services Administration (SAMHSA) SSI/SSDI Outreach, Access, and Recovery (SOAR) Technical Assistance (TA) Center is sponsored by SAMHSA, U.S. Department of Health and Human Services (HHS).

Disclaimer: The SAMHSA SOAR Technical Assistance Center is sending this eNews with support from SAMHSA, HHS. Its contents are solely the responsibility of the authors and do not necessarily represent the official view of HHS or SAMHSA.

Share this email:



[Manage](#) your preferences | [Opt out](#) using **TrueRemove™**

Got this as a forward? [Sign up](#) to receive our future emails.

View this email [online](#).

SAMHSA 5600 Fishers Ln
Rockville, MD | 20857 US

This email was sent to hdavis@prainc.com.

To continue receiving our emails, add us to your address book.